

4.8 NOTES

Introduction

The Notes screen allows you to:

- View notes for an ID for multiple stat periods
- Add notes
- Delete notes
- Classify notes as Interviewer, Analyst, or Respondent Remark
- Link notes to an item, case, alpha, or alpha mail group

The StEPS Notes screen allows you to enter notes or comments about a case ID. Notes may be entered at the ID-level, may be associated with a specific item within an ID, or may be linked to all IDs associated with a company name (Alpha). In addition, you may enter a note that applies to all IDs in an alpha mailgroup. There are three different types of notes:

- A Analyst note (Analyst enters note)
- I Interview note (Usually entered by a clerk at the National Processing Center)
- R Respondent remark (Provided by respondent and usually entered on the form)

Accessing the Screen

The Notes screen can be accessed only through one of the ID-based Review and Correction screens.

- Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.

- Select Option 1 - Review & Correction via selection set. This will display the Review and Correction Main Menu.
- From the Review and Correction Main Menu, choose a selection set to process. (See Chapter 4.1 for more information on accessing and creating selection sets.)
- Select the GOTO pmenu from the Review and Correction Main Menu.
- Select an ID-based Review and Correction screen by clicking on the “Control Data” or “Item Data” option, and then selecting one of the following screens: ID by Item, ID Matrix, Control Information, Historical, Audit Trail by ID (Control or Item).
- Once you have accessed a Review and Correction ID-based screen, you can access the notes for the ID in one of three ways:
 1. Select the GOTO pmenu from the ID-based Review and Correction screen, then select the NOTES option.
 2. If notes exist for a case ID, the ID Flags field in the header of certain ID-based screens (ID by Item, ID Matrix) will contain an “N.” Click on the “N” in the ID Flags field to access the Notes screen for the ID indicated.
 3. If a note is associated with a specific item, an “N” will appear in the Notes column on the ID by Item screen. Click on the “N” to display the note associated with the item.

NOTE: OPTION 3 WILL ONLY DISPLAY THE NOTE ASSOCIATED WITH A SPECIFIC ITEM. TO ACCESS THE NOTES SCREEN, YOU MUST CHOOSE OPTIONS 1 OR 2.

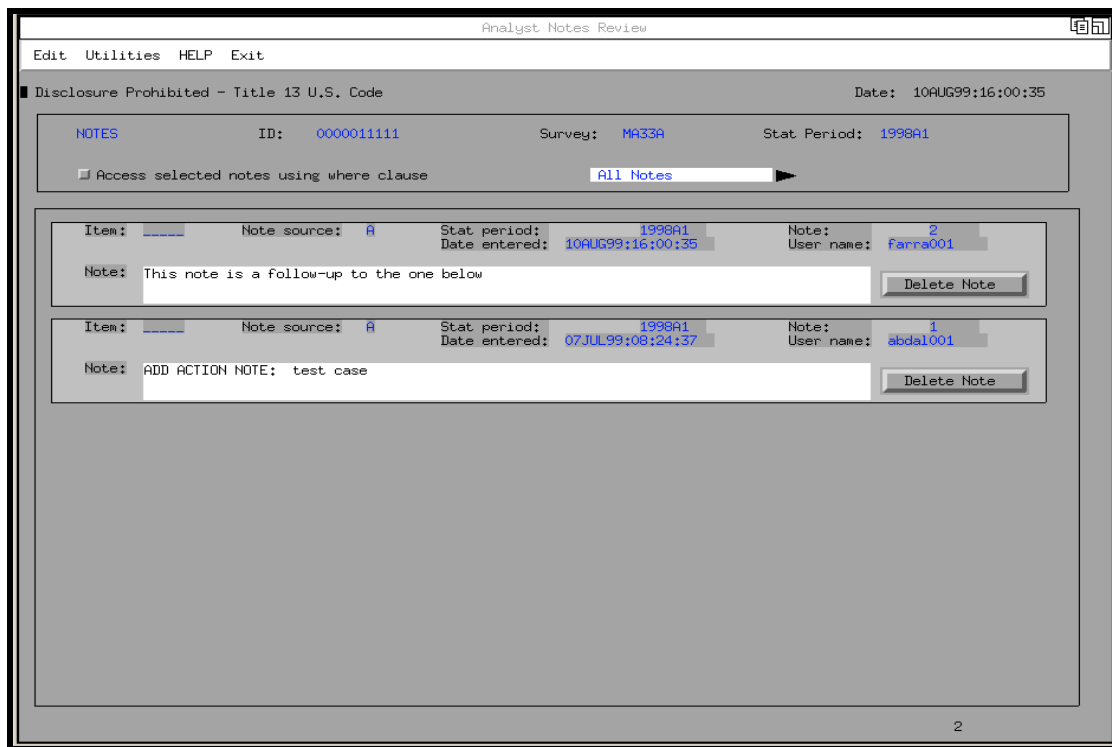


Figure 4.8 Notes Screen

Screen Features

The Notes screen contains a Header section and a Notes section. The Header section contains the survey, stat period, and ID currently being processed. It provides options for accessing notes which meet specified criteria (i.e., only access analyst notes, only access respondent remarks, only access notes for stat period 2001A1). The Notes section displays the text of the notes for the ID and information about each note (i.e., date note was entered, type of note, username of person who entered note).

4.8.1 HEADER SECTION

ID

- Displays the ID of case being reviewed.
- Field not correctable.
- To access a different ID, you must exit the Notes screen and return to the previous ID screen.

SURVEY

- Displays default survey currently being processed.

- Field not correctable.
- To change the survey, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).
- Click on the survey field to display the survey name.

STAT PERIOD

- Displays default stat period currently being processed.
- Field not correctable.
- To change the stat period, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).

The check box that allows you to “Access Notes Using Where Clause” and the arrow (➤) that displays a list of note types you can view are described in sections 4.8.3 and 4.8.4 below.

4.8.2 NOTES SECTION

Each note will be displayed as follows:

The screenshot shows the 'SAS: Analyst Notes Review' window. At the top, it says 'Disclosure Prohibited - Title 13 U.S. Code' and 'Date: 08MAR04:14:32:34'. Below this is a header section with 'NOTES', 'ID: 0011001100', 'Survey: NSURV', and 'Stat Period: 2000A1'. There is a checkbox 'Access selected notes using where clause' and a dropdown menu 'All Notes'. The main area displays a list of notes, each with a 'Delete Note' button. The notes are as follows:

Item	Alpha	Mail GP	Note source	Stat period	Date entered	Note	User name
	111111		A	2000A1	08MAR04:13:38:17	Company merging with competitor 12/31/04	rober031
	111111	10	A	2000A1	08MAR04:13:38:43	Remove from mail group 10 at end of year 2004	rober031
			R	2000A1	08MAR04:13:39:27	Cannot answer - must get permission from bankruptcy court	rober031
CADSP			I	2000A1	08MAR04:13:40:28	Respondent contacted, refuses response	rober031
			A	2001A1	22JAN04:16:17:44	GHOST ACTION: PREDID 0000000002 TO SUCCID 0011001100 LTSTAT=2001A1 LTDTTE=040122 COVCDE=69	thack003

Figure 4.8.2 Notes Field

The fields are, as follows:

ITEM	Item associated with note (Will be blank for a “case note,” an “alpha” note, or an “alpha mail group” note.)
ALPHA	The 6-character Alpha code associated with the ID selected from the ID-based screen and used to create the note. (Used only for “alpha” notes, and “alpha mail group” notes.)
MAIL GP:	Mail group code for ID used to create an alpha mail group note.
NOTESRCE	Note source: A - analyst, I - interviewer, R - respondent remark
STAT PERIOD	Statistical period when note was entered

NOTE #	Note number (note numbers are assigned automatically by the program; notes are displayed in descending order of note number)
DELFLG	“Y” in this field indicates note has been deleted; will only see this field if you select the “Deleted Notes” option (field not shown in example above; when applicable, this field will appear directly below NOTESRCE)
RMKFLG	Flag to indicate whether case has been processed in the Remarks Coding operation. ‘C’ - codes were set; ‘N’ - no codes were set; ‘blank’ - note has <u>not</u> been reviewed via the Remarks Coding operation.
DATE ENTERED	Date/time note was entered
USER NAME	Name of user who entered note
NOTE	Note text
DELETE NOTE	Click on DELETE NOTE button to delete note; once deleted, note can still be accessed by selecting the “Deleted notes” option

- The sort for notes is ‘ID by descending date by ascending time’. In other words, the most recently dated note will appear first (i.e., a note entered on 4/15/03 will appear before a note entered 1/25/03). If more than one note is entered on the same day, notes will appear in the order in which they were entered (i.e., first note entered will appear first, the second note entered will appear second).
- Use the Page Up and Page Down keys to page through notes. Page Up will take you to the previous screen of notes. Page Down will take you to the next screen of notes.

Explanation of the note categories (Note #s refer to illustration in Figure 4.1.4):

- An Item note refers to a specific item for a specific case (note #9).
- A Case note refers to all items for a specific case (note #10).
- An Alpha note is a company-level note. The ALPHA code is automatically inserted from the control information for the ID selected to create the note. This note will apply to all cases for the ID associated with the ALPHA code (note #12 at the top of the display).
- An Alpha Mail Group Note applies to the mail group for the ID, if any (note #11).

4.8.3 ACCESS SELECTED NOTES USING WHERE CLAUSE

You may enter a ‘where clause’ to limit the number of notes (i.e., interviewer notes, notes where stat period = ‘2000A1’) displayed on the screen. Select the “Access selected notes using where clause” option to display the StEPS Standard Where Clause screen that will help you create your Where Clause:

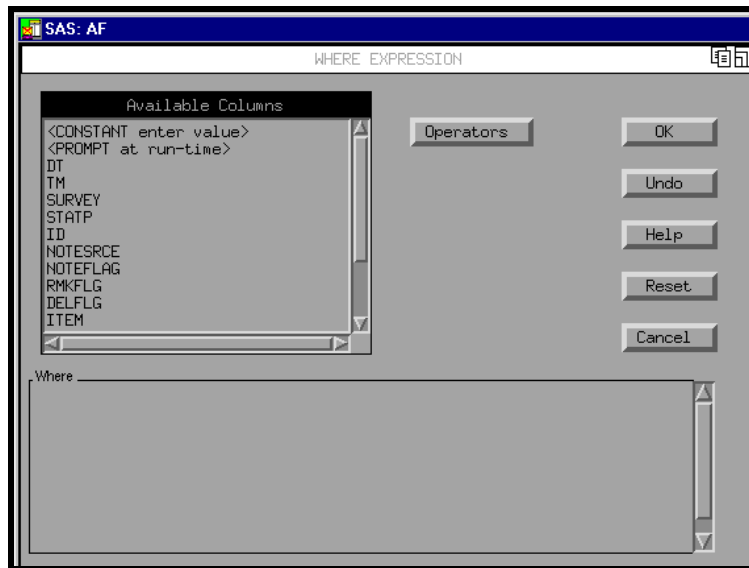


Figure 4.8.3 StEPS Standard Where Clause Screen

- To create a “Where clause,” select a variable from the “Available Columns” box, choose an operator, and select a constant. For example, if you wanted to view only those notes for stat period 2000A1, STATP would be the variable, ‘EQ’ the operator, and ‘2000A1’ the constant. To create the Where clause, you would do the following:
 1. Select “STATP” from the “Available Columns” box.
 2. Click on “Operators” to bring up a pick list of available operators (i.e., EQ, NE, GT, GE, LT, LE).
 3. Click on “EQ” (equal to).
 4. Click on “<CONSTANT enter value>” from the “Available Columns” box.
 5. Another box will display. Enter the constant “2000A1” in the first box and press <ENTER> OR select “LOOKUP” to display a pick list of valid stat periods from which to choose.
- You may choose a single variable or a combination of variables and operators to build your where clause. The variables listed in the “Available Columns” box are from the survey Notes file.
- As you build your “Where clause,” it will be displayed in the “Where” box, at the bottom of the screen. Choose a button from the right side of the screen to do the following:

OK	Submit Where clause
UNDO	Remove the last variable, operator, or constant from the where clause
HELP	Access HELP information on using this screen
RESET	Clear your current Where clause
CANCEL	Do not submit the Where clause; return to the Notes screen

NOTE: CLICK ON THE WHERE CLAUSE SCREEN HELP BUTTON TO ACCESS HELP

INFORMATION ON USING THE WHERE CLAUSE SCREEN.

4.8.4 SELECT NOTE SOURCE

When you first access the Notes screen, the default is to display ALL notes for the ID specified. To access only a specific type of note (i.e., interviewer, analyst, respondent remarks), click on the arrow (▶) in the 'Notes Source' field to display the following options:

Analyst notes	Display analyst notes only (NOTESRCE = 'A')
Respondent remarks	Display respondent remarks only (NOTESRCE = 'R')
Interviewer notes	Display interviewer notes only (NOTESRCE = 'I')
Alpha Notes	Display notes related to a given 6-character company ID – Alpha code automatically inserted from ID selected to create a note
Alpha Mailgroup Notes	Display notes related to an Alpha mailgroup – Alpha code and mailgroup of ID selected to create note displayed
All notes	Display all analyst, interviewer, and respondent remarks
Deleted notes	Display notes that were previously deleted
User where clause	Access the StEPS standard Where clause screen

Only those notes which correspond to the note source chosen will be displayed on the screen. If no observations exist for your selection, (i.e., you select 'Interviewer notes' and no interviewer notes exist) a message will display indicating this, and the program will default to "All notes."

4.8.5 ADD NOTE

To add a note, click on the EDIT pmenu and select the "Add note" option to display the following screen:

- Click on the type of note you want to add: Analyst, Interviewer, Respondent Remark.
- Click on the appropriate button to indicate if the note is a Case note (ID-level), an Item note (item-specific), an Alpha note (which will apply to all cases for a company ID), or an Alpha Mailgroup note (related to all cases in a mail group for a company ID).
- If want to add an item-specific note, you will be prompted to enter an item. You may enter an item or choose one from the pick list.
- Enter the note's text in the box provided. StEPS has been modified to handle longer notes. There is no need to create multiple notes if a note contains more than 160 characters.
- After you have entered the note' text, click on "OK" to add the note.
- Click on "Cancel" to exit the screen without adding a note.

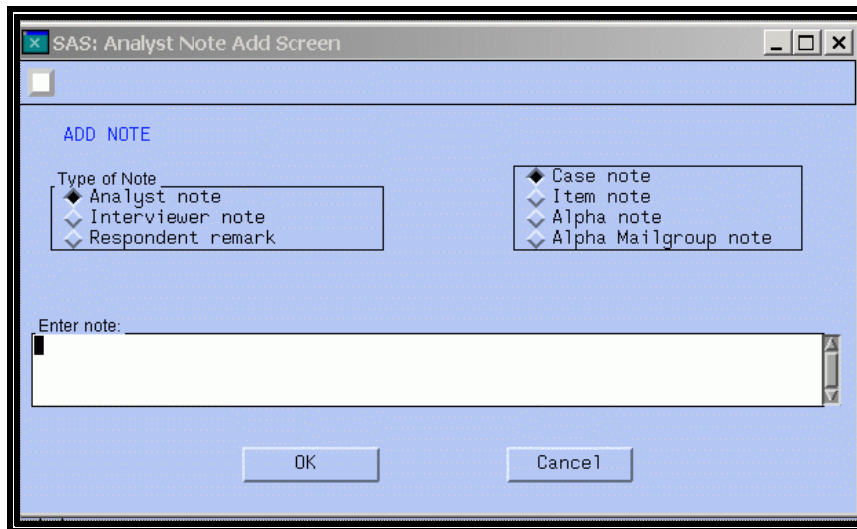


Figure 4.8.5 Add Note Screen

4.8.6 DELETE/RESTORE NOTES

- To delete a note, click on the “Delete Note” button located to the right of the note.
- To restore a deleted note:
 1. Select the “Deleted notes” option from the pick list in the Header section to display all notes previously deleted.
 2. Click on the “Undelete note” button located to the right of the note you want to restore.

4.8.7 PRINT NOTES

To print notes:

- Click on the UTILITIES pmenu.
- Select the “Print notes” option to display the following SAS Output window:

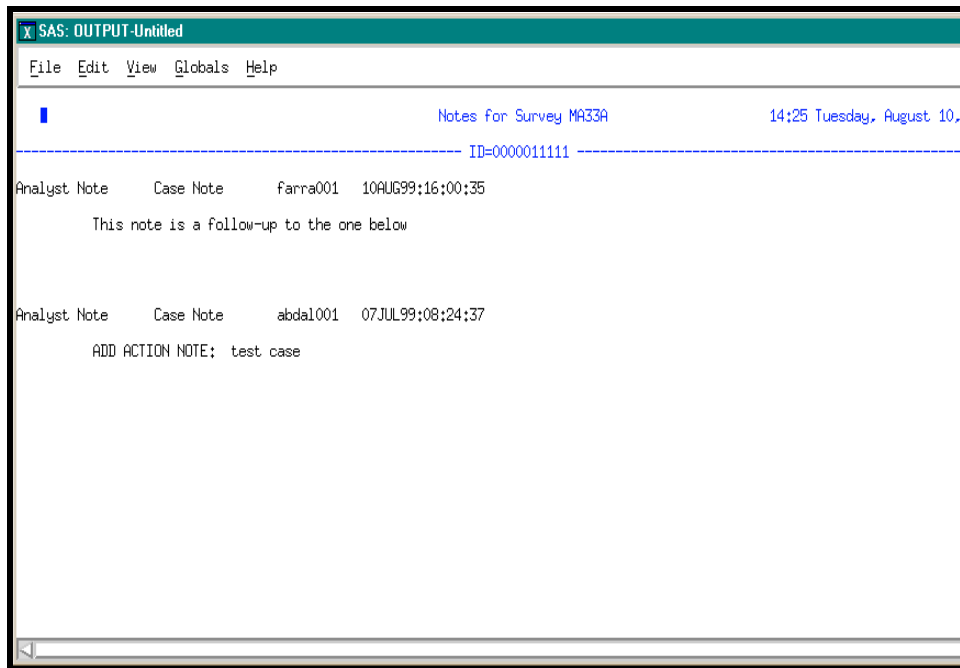


Figure 4.8.7a SAS Output Window

1. Click on “File.”
2. Click on “Print” to display the following SAS Print screen:

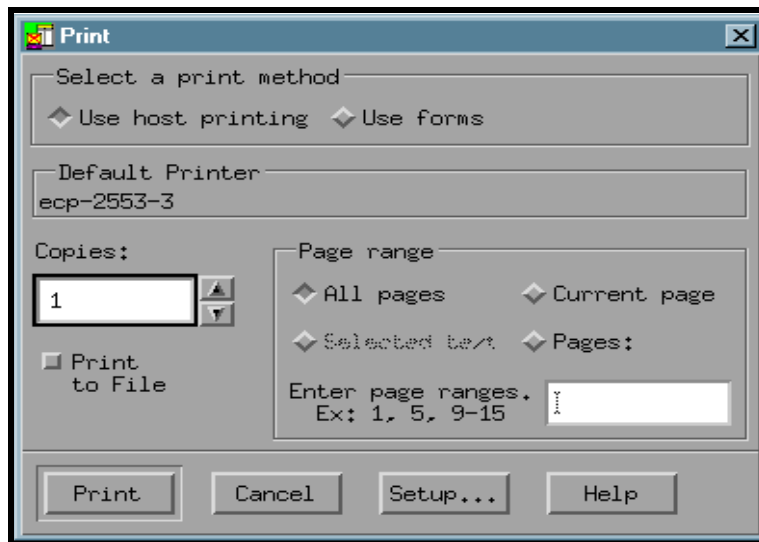


Figure 4.8.7b SAS Print Screen

1. Click on the “Print” button at the bottom of the screen. The notes will be sent to your default printer.
2. Close the SAS Output window by clicking on “File” and then “End.”

P-Menus

P-Menu	Options	Function
EDIT	Add note	Add a note to the notes file for this ID
UTILITIES	Next page (PgDn) Previous page (PgUp) Top Bottom Print notes	Access next screen of notes for ID Access previous screen of notes for ID Access first note for ID Access last note for ID Print notes
HELP	Notes Help (F1) Note Flags WhoamI (F7)	Display Help information on using the Notes screen Display note flags and corresponding definitions Display user default and systems information
EXIT	Exit (F3)	Exit to previous screen